

REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS
OF SAN BERNARDINO COUNTY, CALIFORNIA
AND RECORD OF ACTION

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May 20, 2003

FROM: MARY R. SAWICKI, Director
Department of Aging and Adult Services

SUBJECT: PURCHASE ORDER FOR SOFTWARE USER LICENSES WITH
SYNERGY SOFTWARE TECHNOLOGIES, INC.

RECOMMENDATION: Authorize the Purchasing Agent to issue a purchase order in the amount of \$52,000 to Synergy Technologies, Inc., for annual software user licenses for the Social Assistance and Management Systems (SAMS) application for the period of June 15, 2003, through August 15, 2004.

BACKGROUND: In July 2000, the Department of Aging and Adult Services (DAAS) purchased software user licenses from Synergy Technologies, Inc., for the SAMS client management system to be used by DAAS support staff and contractors to perform client tracking and mandated data reporting to the California Department of Aging (CDA). The version of SAMS currently being utilized by DAAS has become obsolete and is no longer supported by the vendor.

Synergy Technologies, Inc., has developed a new, more technologically advanced web-based version of the software called SAMS 2000. This newer version of SAMS will allow DAAS to deploy the system to all district offices, as well as to contractors having a large volume of client tracking, to allow for a more comprehensive and integrated data solution. The new version will also allow for performance and outcome measurement of service delivery and utilization.

There are currently only three known providers of the required client management system. DAAS received quotes from two; 1) Synergy Technologies, Inc. and 2) Care Access/CH Mack Incorporated, both of which are leading software providers in aging client tracking and reporting systems. The third known provider, RTZ Associates Inc. (RTZ) based in Oakland, California provides a system that was funded by a California Grant initiative and is currently being evaluated by San Francisco County for usability and affordability. No other Area Agencies on Agency in California are using and/or evaluating the system thus it was determined RTZ was not a viable option at this time. County Policy 11-04 requires Board of Supervisor approval when less than three responses are received on a solicitation.

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An evaluation of the quotes was completed and it was found that the response submitted by Synergy Technologies Inc., best met the service requirements as defined by the solicitation and was the most cost effective.

Proposers	Total Quote	Recommendation
Care Access/CH Mack Incorporated	\$ 77,372	Not Recommended
Synergy Technologies Inc.	\$ 52,000	Recommended

Care Access/CH Mack Incorporated was deficient in the service delivery agreement in that it did not meet the department's needs in terms of data location, storage, security, and data recovery. In contrast, Synergy Technologies, Inc., service agreement sufficiently addressed these items.

Synergy Technologies Inc. has provided social service software solutions since 1992 and their products are used in 31 states and territories nationwide and include several Area Agencies on Agency in California. Synergy Technologies Inc. was also chosen by the National Association of State Units on Aging (NASUA) to develop a national database and reporting structure for the National Aging Program Information System (NAPIS). The benefit of selecting a legacy system such as Synergy Technologies Inc. is that they have a unique knowledge of the service needs of the client base in which we serve and they provide the necessary tools to provide a seamless service delivery system where multiple program sources serve the same client base.

Approval of this item will authorize the Purchasing Department to issue a Purchase Order for FY 02/03 in the amount of \$52,000 for the purchase of 30 user, 1 Designer Product license, 2 Data Analyzer licenses, a one-time set up fee, an annual web subscription fee, and conversion and on-site user training for 40 users.

REVIEW BY OTHERS: This action has been reviewed by the Office of County Counsel (Phebe W. Chu, Deputy County Counsel) on May 7, 2003; the County Purchasing Department (Aurelio De La Torre, Director) on May 8, 2003; by HSS Information Technology Support Department (Steve Hall, Information Services Manager) on May 8, 2003; and by the Senior Affairs Executive Committee on May 13, 2003. This item has been reviewed by HSS Finance (Kristin Letterman, Administrative Manager) on May 8, 2003 and by the County Administrative Office (Gary Morris, Administrative Analyst) on May 8, 2003.

FINANCIAL IMPACT: Adequate appropriations and revenues of \$52,000 have been included in the department's approved FY02/03 budget and the local match requirement has been met for FY02/03. This program is Federally, State, and local funded. The County match requirement is met through Realignment revenues and the in-kind contributions of participating contractors. There are no additional local costs.

Cost Reduction Review: The County Administrative Office has reviewed this agenda item and recommends this action because the program is primarily funded by Federal and State revenue sources that are not in jeopardy in FY02/03.

SUPERVISORIAL DISTRICTS: All

PRESENTER: Mary R. Sawicki, Director, Department of Aging & Adult Services, (909) 891-3917

